

Welcome!

April 2023
OC HMIS User Meeting

**Please enter your agency
name in the chat box**



Agenda

1. Data Quality Plan
2. Client Record Request
3. HMIS Helpdesk Ticket
4. HMIS Staff Onboarding
5. Release of Information - Unaccompanied Minors
6. Updated to Intake Forms
7. Deleting Services and Program Enrollments
8. Service Delivery Types
9. CES Report Training
10. Data & Performance Management Meeting Agenda
11. Q&A
12. Office Hours

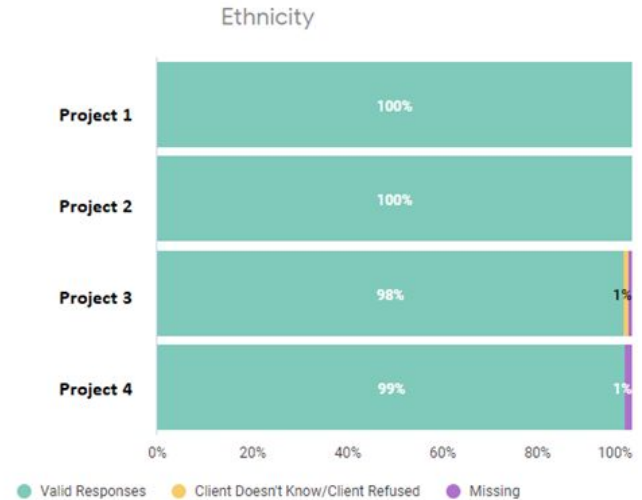
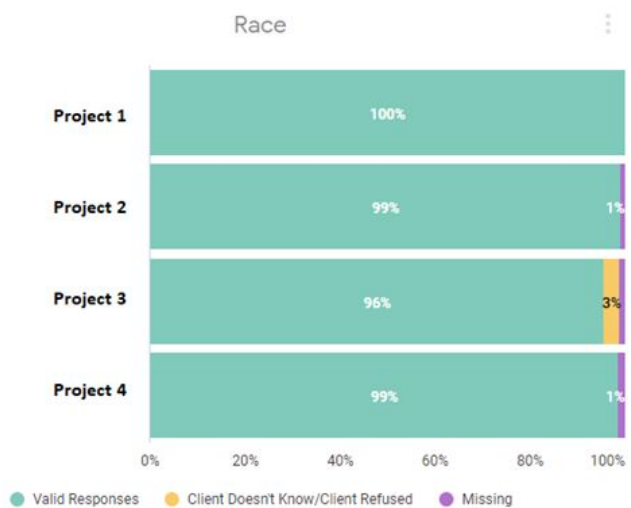
Data Quality Plan

- The [OC HMIS Data Quality Plan](#) and [Data Quality Tools Guide](#) are now available!
- Purpose:
 - Help users understand the different components of data quality
 - Standardize the data quality monitoring and reporting process
 - Establish policies for data quality incentives and enforcements
 - Provide users with tools to manage their agency's data quality



Data Completeness

Required data is known and documented



Source: UDE Data Completeness Dashboard

Data Coverage

Homeless Services Providers within the CoC's geographic coverage area enter all homeless clients' information into the OC HMIS

HMIS Participation *Excludes under development, overflow, seasonal, and domestic violence beds.*

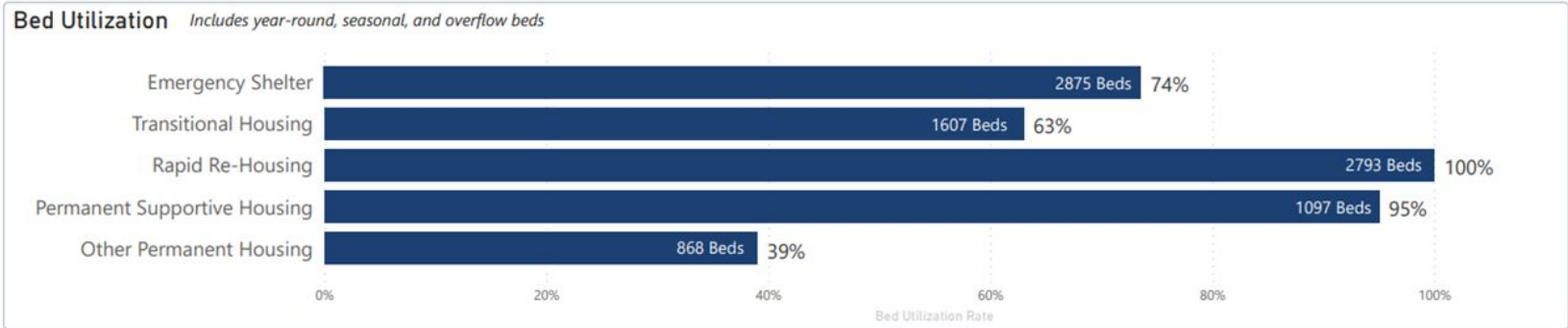
● HMIS Participating ● Not Participating



Source: 2022 HIC Overview

Bed Utilization

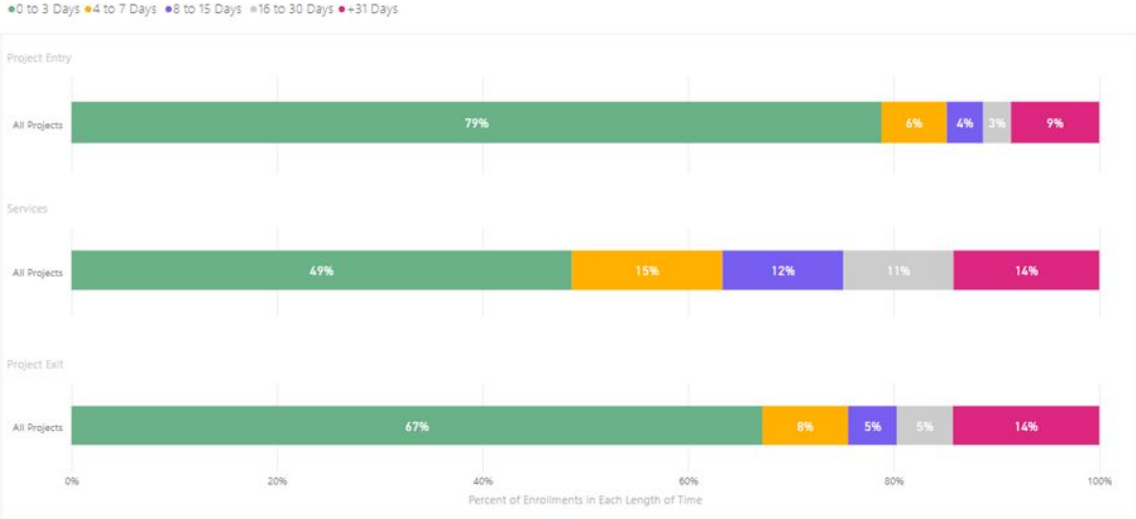
Total number of occupied homeless beds within the HMIS divided by the total number of homeless beds within the CoC's geographic coverage area



Source: 2022 HIC Overview

Data Timeliness

Data is collected in HMIS and available when it is needed



Source: Data Quality Report Cards

Data Accuracy

Data entered in HMIS represents the real information about the clients that are served in the projects contributing data to the system and the services that are provided to clients



Source: Data Accuracy Dashboard

Data Consistency

Data is equivalent in the way it is collected and stored among all the Homeless Services Providers that participate in the OC HMIS

Data Element: 3.10 Project Start Date

Determines when a client begins to participate in a project.



Determining when exactly a client is considered to have begun participating in a project varies by project type.

Ask things like...

- **Street Outreach:** When was the first contact with the client made?
- **Emergency Shelter:** When was the first night that the client stayed in the shelter?
 - **Night-by-night Shelters:** *Unless the client has not returned to the shelter in the last 90 days, the client will remain enrolled.*
- **Transitional Housing:** When did the client move into the unit? When was the first night they slept in the residence?
- **Permanent Housing, including Rapid Rehousing:** When was the client accepted into the project? Acceptance into a Permanent Housing project is determined when the following events take place:
 - Information given by the client, or the referral, indicate that the client will meet the criteria for admission, and;
 - The client has indicated that they want to be housed by this project, and;
 - The client is able to access services and housing through the project. The expectation is that the project has housing opening or expects to have availability in a reasonably short amount of time.
- **Services Only, Day Shelter, Homeless Prevention, Coordinated Entry:** When did the client begin working with the project and receiving services?

Source: OC HMIS Data Element Cheat Sheet:
Profile Creation and Project Enrollment

Data Quality Monitoring & Reporting Process

Quarters	Step 1 211OC Sends DQ Corrections to Agency Administrators	Step 2 Agencies correct DQ errors and missing information in HMIS	Step 3 211OC publishes Data Quality Report Cards
Q1: 1/1 – 3/31	April 5 th	April 18 th	April 30 th
Q2: 4/1 – 6/30	July 5 th	July 18 th	July 30 th
Q3: 7/1 – 9/30	October 5 th	October 18 th	October 30 th
Q4: 10/1 – 12/31	January 5 th	January 18 th	January 30 th

Incentives

Agencies with projects that met data quality thresholds for all four quarters in the calendar year will be shared with the CoC Board and published on the ochmis.org website

Enforcements

Projects with at least four data elements under 80% in any quarter will receive technical support from 211OC

Projects targeted for technical support in 4 consecutive quarters will be shared with the CoC Board, and if the agency applies for funding approved by the CoC Board they will address data quality issues in their application

Projects not receiving funding that requires HMIS participation will be reviewed by the Agency Access Working Group to determine the appropriateness of the project's continued HMIS participation

Client Record Request

- Clients in OC HMIS have the right to review a copy of their data as entered in HMIS. They may submit the request to any agency participating in OC HMIS that they have been served by in the past.
- Clients may inspect and obtain a copy of their data as entered in HMIS.
 - Client's profile screen
 - Release of Information
 - Enrollment history
 - List of uploaded documents
- An Agency Administrator at the agency is required to review the dashboard with the client upon request.

KB: [Client Record Requests](#)



Client Profile

First Name	Black
Middle Name	
Last Name	Widow
Suffix	Ø
Name Data Quality	Full name reported
Date of Birth Date	1988-09-05
DoB Data Quality	Full DOB Reported
SSN	000-00-0000
SSN Data Quality	Client doesn't know
Ethnicity	Hispanic/Latin(a)(o)(x)
Gender	Female
Race	American Indian, Alaska Native, or Indigenous
Veteran Status	Yes
Branch of Military	Army
Discharge Status	Honorable
Year Entered Military Service	2010
Year Separated from Military Service	2013
Theatre - Afghanistan OEF	Yes
Theatre - Iraq OIF	Yes
Theatre - Iraq OND	No
Theatre - Korean War	No
Theatre - Other	No
Theatre - Persian Gulf ODS	No
Theatre - Vietnam War	No
Theatre - World War II	No

Release of Information

Agency Name	Orange County United Way
Documentation	Electronic Signature
Start Date	2018-05-17
End Date	2025-05-17
Permission	Yes

Enrollment History

Agency Name	Name	Project Start Date	Project Exit Date
Erin's Agency	Erin's Transitional Housing	2021-10-20	Ø
OC Training Agency	Non-Federally Funded Homeless Prevention Training Project	2021-05-26	Ø
County of Orange	Individual Coordinated Entry System	2021-04-14	Ø
Family Solutions Collaborative	Family Coordinated Entry	2021-03-26	Ø
Orange County United Way	WelcomeHomeOC	2019-10-01	Ø
System	Family Shelter	2019-08-08	2019-09-06
Erin's Agency	CFCOC ES Test	2018-06-15	Ø
Mercy House	Regina House Emergency	2018-06-15	Ø
Erin's Agency	ESG Street Outreach	2018-05-01	Ø

Client Documentation

Agency Uploaded	Client File Category	Client File Name	Client File Other Name	Last Updated Date
Orange County United Way	WelcomeHomeOC	Rental Application	Rental Application	2020-02-12
Orange County United Way	WelcomeHomeOC	Moving Cost Reimbursement	Moving Cost Reimbursement	2020-02-12

HMIS Helpdesk Ticket

- Review the [Knowledge Base Library](#)
- Only Agency Admins should submit tickets to the HMIS Helpdesk
- Provide all necessary details for the HMIS Helpdesk Team to support with your ticket
 - Report name, filters, client ids
- To request for a status update, please reply to the ticket you created
 - [Creating a Help Desk Account](#)

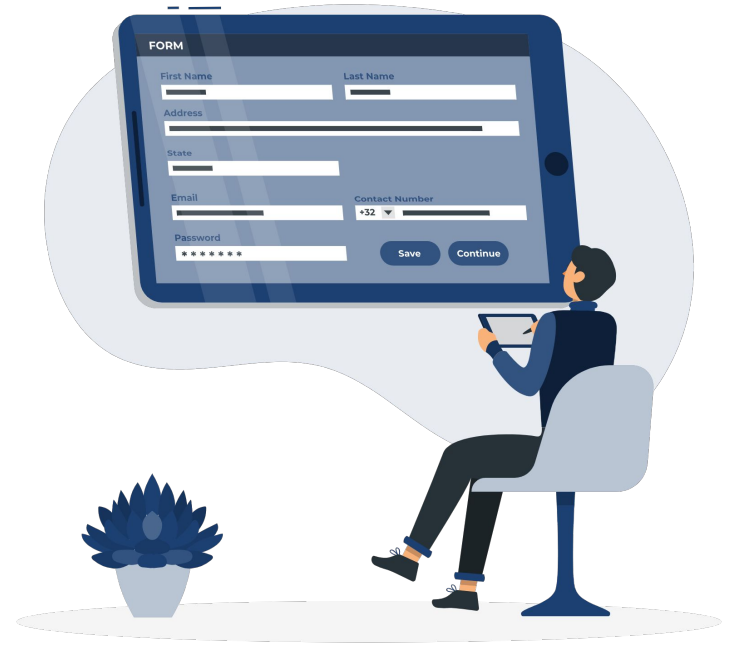


HMIS Staff Onboarding

When adding new staff to your agency there are a few tasks that need to be completed

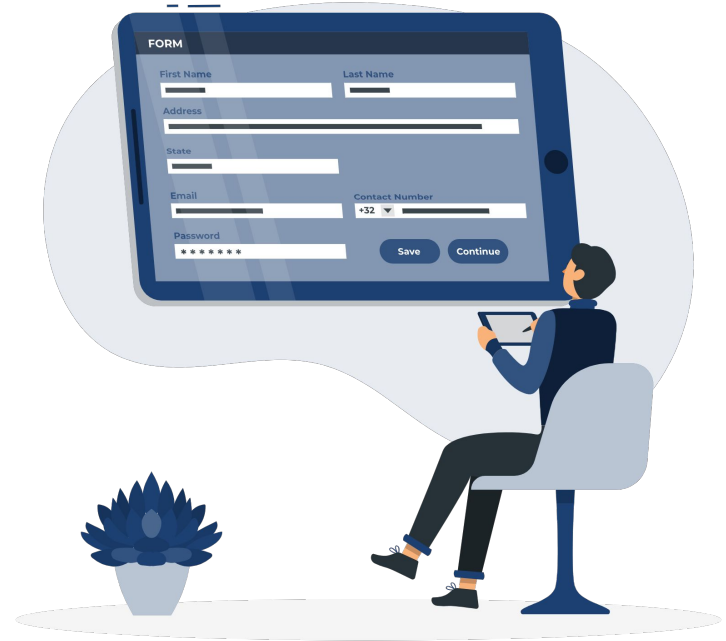
- Training Courses - New staff need to take training courses based on their access role.
 - HMIS Part 1 - Covers history of HMIS, privacy and security, basic HUD definitions, and HMIS best practices.
 - HMIS Part 2 - Covers HMIS functionality.
 - HMIS Skills Test - Test knowledge from the training courses.

For information on New Staff Onboarding, please refer to the knowledge base article [New Staff Onboarding](#)



HMIS Staff Onboarding

- When the new staff have completed the training courses and the HMIS Skills Test. You will need to submit an [HMIS Account Update & Testing form](#) with the new staff's information and the fictitious household that was created on the Training site.
- For any account, it is a good practice to ask the user for the certification that they completed the training courses necessary for an account activation.



HMIS Staff Onboarding

My Online Courses

[Dashboard](#) • [My Courses](#) • [My Grades](#) • [My Memberships](#) • [My Achievements](#) • [My Certificates](#) • [Notifications](#) • [Edit Account](#) • [Redeem a Voucher](#) • [Order History](#) • [Sign Out](#)

My Achievements

Congrats!

**HMIS PART 2
TRAINING COMPLETE**



HMIS Part 2 Training Complete!

Congrats!

**HMIS PART 1
TRAINING COMPLETE**



HMIS Part 1 Training Complete!

Congrats!

**2020 CES DATA
STANDARDS
TRAINING COMPLETE**



2020 CES Data Standards
Training

Congrats!

**COORDINATED ENTRY
TRAINING COMPLETE**



HMIS Coordinated Entry Training
Completed!

Release of Information - Unaccompanied Minors

Unaccompanied minors (a single client age 17 or under, or a household where all clients are 17 or under) CANNOT consent to share their personal information in HMIS.

- In these situations, Permission should be set to No, and Client Privacy must be set to "Private."

Data can only be shared if written consent is obtained from the parent or legal guardian of a youth who is under age 18 or with written consent from a youth who is 18 and older.

[Accessing and Completing Release of Information \(ROI\) Page KB](#)

RELEASE OF INFORMATION		
Permission	<input type="text" value="No"/>	▼
Start Date	04/04/2023	<input type="text" value="25"/>
End Date	04/04/2029	<input type="text" value="25"/>

PRIVACY		
Client Privacy	Public	<input type="text" value="Private"/>

Updated Intake Forms

The following English and Spanish Intake Forms have been updated to include the military service Theater of Operations:

- CoC/ESG
- PATH
- HOPWA
- No Federal Funding



Deleting Services and Program Enrollments

Services and program can be deleted if they were entered incorrectly.

1. Search for the name of the client and click on the Edit icon next to the profile record you wish to edit
2. Go to the *History* tab, and hover to the left of the service/enrollment you wish to delete until the *Trash* icon appears and then select it
3. Confirm the deletion by clicking “OK”



*NOTE: Only Agency Administrators can delete program enrollments. Program Enrollments cannot be deleted if there are services linked to the enrollment.

Fake Client

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

HISTORY

Advanced search options View ▾


Service Name	Start Date	End Date
 Case Management:Case Management System	04/04/2023	04/04/2023
 Shelter Program System	04/04/2023	Active

Fake Client

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

HISTORY

Advanced search options View ▾

Service Name	Start Date	End Date
 Shelter Program System	04/04/2023	Active

Service Delivery Types

- In Clarity, *Services* are set up as service categories with multiple *Service Items* under them.
- *Service items* are the actual services provided to the client, and are what show up on various reports, like APRs and CSV exports. An example might be:
 - A "Food" service category may have "Meal Voucher," "Bag of Groceries," and "Meal On Site" service items.
- *Service Delivery* is the frequency by which these service items are provided.
- There are four *Service Delivery* delivery types: Long Term, Single Event, Daily Attendance, and Multiple Attendance.

PROGRAM: RHY FUNDED TRANSITIONAL HOUSING TRAINING PROJECT

Enrollment History **Provide Services** Assessments Notes Files Forms ✕ Exit

Services

Community service/service learning (CSL)	RHY Service ▼
Criminal justice/legal services	RHY Service ▼
Education	RHY Service ▼
Employment and/or training services	RHY Service ▼
Food	Food ▼
Bag of Groceries	▼
Meal On Site	▼
Meal Voucher	▼

Service Delivery Types

	Long Term	Single Event	Daily Attendance	Multiple Attendance
Definition	Not provided to clients every day (generally)	Associated with a single date or on an "as needed basis"	Provided on a daily basis	Provided multiple times per day
HMIS Procedure	Select a Start Date and End Date; the End Date can be more than 180 days after the Start Date	Select an Event Date, which will be recorded as the service item Start Date and End Date	Record "Daily Attendance" service items once per day or once with an End Date up to 180 days after the Start Date	Record these service items multiple times per day; each time you record the service item, you will enter a Date and Time
Examples	Case Management	A gift card; a bus pass	Bed nights for Emergency Shelter projects	Meals

Service Delivery Types

The following service items are suggested to be configured as "Single Event" since they are always associated with a single date:

- W1 Services Provided - HOPWA
- W2 Financial Assistance- HOPWA
- P1 Services Provided - PATH Funded
- P2 Referrals Provided - PATH
- R14 RHY Service Connections
- V2 Services Provided - SSVF
- V3 - Financial Assistance - SSVF
- V8 HUD-VASH Voucher Tracking

Additional information, can be found on the [New Agency/Program Set-Up](#) Cognito form, and the [Adding Services](#) and [Attendance Based Services](#) KBs.



CES Reports Training

- The HMIS Helpdesk Team will be hosting a CES Reports Training session on Thursday, April 27th at 2pm.
- A reminder newsletter with more details will be sent out the week of the training.



Graphic by <https://storyset.com/online>

Data & Performance Management Committee Meeting

Agenda:

The April 2023 Data & Performance Management Committee Meeting will be cancelled.

The PSH/OPH Project Performance Report will be published next week!

Q&A

Reminder: Please enter your agency name in the chat box for attendance

Thank you
Have a great day!

Next User Meeting: May 3rd

Office Hours